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Global Analysis Report

Setor Trend Analysis

Shellfish Product Trends in France

June 2017

Executive summary

France is a major market for seafood, with one of the highest levels of per capita seafood consumption in Europe (37kg per year), a population of more than 65 million, and domestic production well below consumption. Domestic shellfish production meets only about 65% of French consumer demand.

France is a major consumer and net importer of many shellfish products. In 2016, France imported C$660.3 million worth of shellfish from the world; of which, 10,013 metric tonnes worth $C250.0 million was frozen scallops.

According to Global Trade Tracker data, France imported 31.1 million of shellfish from Canada in 2016. By value, Canada, with a 4.7% market share, was the ninth largest supplier and 95% of shellfish supplied were scallops. The Canadian shellfish products are considered to be of superior quality, in terms of both sizes available and product quality.

Overall, French demand for seafood remains high but declines in consumer purchasing power have led consumers to be more cautious about spending. According to Euromonitor's recent data, total volume sales of processed fish and seafood in France decreased by 0.3% in 2016 to 312,800 MT, however at the same time the value of processed fish and seafood sold increased by 5%, reaching US$3.1 billion in 2016. Sales of other high-value priced products (like lobster, scallops and monkfish) at retail and foodservice saw the largest increases.

According to the Market Assessment of Opportunities and Challenges in the European Union (EU) report, shellfish in France have been identified as one of the most promising market opportunity in the EU. Through a rigorous analysis of the market size, growth, and tariff reductions of the EU imports, France represented an ideal opportunity for Canadian shellfish and other seafood products exporters.

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Consumption

France represents a considerable consumer market. The country's population hovers around 65 million in 2016, and continues to grow at a yearly rate of around 0.5%. According to projections by Eurostat, the French population will reach 70 million by 2045. France is also the most popular tourist destination in the world and welcomes over 80 million foreign visitors per year.

The French gastronomic heritage makes the French consumer an educated one. French cuisine is one of the finest in Europe; cooking fish and seafood, is deeply rooted in the culinary tradition in coastal regions of France and well entrenched in the French culture and lifestyle.

Traditionally, price has been an essential element in the food buying process of French consumers. However, quality is becoming increasingly important, as a growing number of French consumers tend to favour products with a quality label or brand. French consumers prefer neat and tightly packaged products that are creative and eye-catching.

Sales of fish and seafood by category in France: total volume 2011-2016 (000 tonnes)

Category	2011	2012	2013	2014	2015	2016
Fish and Seafood	315.4	321.7	317.6	317.4	313.8	312.8
Fish	186	193.4	187.9	184.3	179.5	178.9
Molluscs and Cephalopods	111.1	110.6	112.6	115.5	116.2	115.5
Crustaceans	18.3	17.7	17.1	17.5	18	18.5

Sales of fish and seafood by category in France: total volume 2011-2016 in US$ in million

Category	2011	2012	2013	2014	2015	2016
Fish and Seafood	2,850.8	3,015.3	3,055.8	3,048.0	3,012.5	3,161.8
Fish	2,080.8	2,230.8	2,240.8	2,203.8	2,168.5	2,284.2
Molluscs and Cephalopods	571.3	586.2	616.8	629.0	641.7	649.0
Crustaceans	198.8	198.3	198.3	215.2	202.2	228.6

Sales of Fish and Seafood by Packaged vs Unpackaged: % Total Volume 2013-2015

% retail volume	2013	2014	2015
Packaged	22.1	21.5	21.6
Unpackaged	77.9	78.5	78.4
Total	100	100	100

Source for both: Euromonitor, 2017

Consumer attitudes

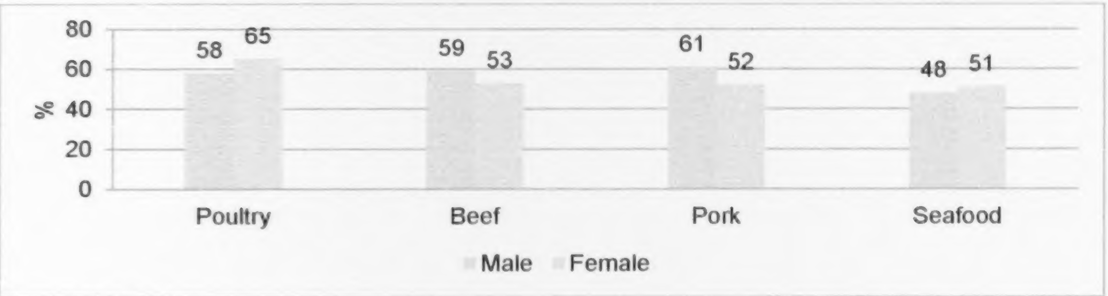
France is a major market for seafood. According to France Agrimer's annual report, total per capita consumption of fish and seafood was estimated at 36.8 kg in 2016. This number is based on live weight catch and national population numbers.

According to Euromonitor, the consumers who eat seafood the most are the older age groups. This is because they generally have less budgetary restraints, better cooking skills, more time for cooking and care more about a healthy diet.

The Mintel survey on fish and seafood consumption confirms the same trend, showing that in the last five last years in France, the older consumers are the ones who consume the most seafood. Among those over 45 years, 43% consume two portions a week, whereas only 32% of consumers between 18 and 34 years old consume two portions per week.

Agrimer's report notes that the association between fish consumption and healthy lifestyle differed slightly between men and women in France. Fish consumption among women was positively associated with other foods considered healthy (e.g., root vegetables, chicken, and berries), as well as with other healthy lifestyle factors (e.g., exercise).

Frequency of protein type consumption at least once a week by gender in France in 2016



Source: Agrimer 2017

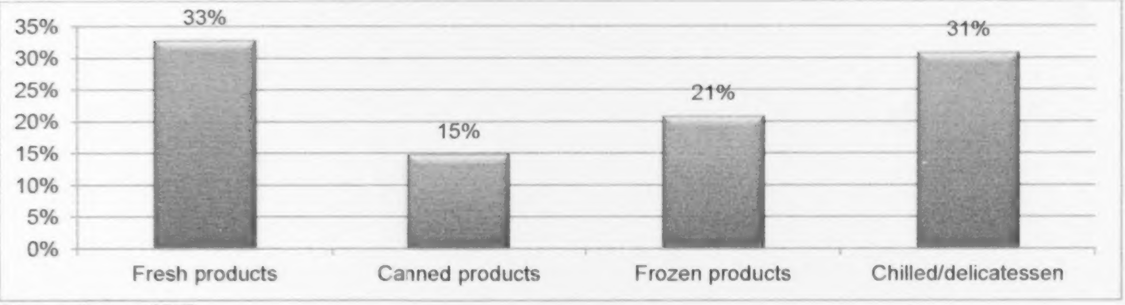
French consumers have become more aware of healthy diets and many are increasingly trying to eat balanced meals. Consequently, there has been greater demand for seafood products, and most supermarkets offer a wide range of fish and seafood.

In addition, Seafood and specifically shellfish products demand is strong within the French hotel and restaurant sector due to strong domestic appreciation and the high volume of tourism. France remains a leading tourist destination worldwide, receiving an average of 80 million visitors yearly. According to Euromonitor, tourist spending, both international and domestic, played a major role in sustaining the hotels and restaurants activities in France.

Market sizes

France has the third highest consumption per capita of seafood in Europe after Italy and Spain. This stood at 36.8 kg in 2016 (26.5 fish and 10.3 shellfish). The total comparable figure for 2010 was 35.7kg, showing a slight long-term rise. The average consumption per capita consisted of 57% wild fish, 11% farmed fish, 15% shellfish and 17% farmed shellfish.

Household expenditure on seafood in France in 2016



Source: Agrimer 2017

Historic processed seafood value sales by category in France in US$ in million

Category	2011	2012	2013	2014	2015	2016
Processed seafood	3,692.7	3,738.2	3,755.8	3,710.2	3,777.0	3,848.8
Shelf stable seafood	1,002.3	1,031.3	1,073.6	1,065.0	1,079.9	1,094.6
Chilled processed seafood	2,189.6	2,192.5	2,150.8	2,127.2	2,188.9	2,250.4
Frozen processed seafood	500.8	514.4	531.3	518.1	508.2	503.9

Source: Euromonitor 2017

Shellfish market

The French are major consumers of shellfish (mussels, scallops and oysters) . French fisheries dos not produce enough to supply the domestic market, which makes it an attractive market for exporters.

According to Global Trade Tracker data, France imported C$660.3 million (up 2.5% over 2015) and 103.0 MT (up 2.3%) of shellfish in 2016. By value, the United Kingdom (UK), with a 16.1% market share, was the leading supplier of shellfish products to France. Canada ranked the ninth largest supplier with 4.7% market share and exports values reaching C$31.1 million.

Top ten suppliers of fresh, frozen and processed shellfish to France by value in C$ (based on French imports data)

Rank	Country	2012	2013	2014	2015	2016	Market share % in 2016
World		558,377,196	581,076,568	616,925,584	643,996,928	660,333,244	100.0%
1	United Kingdom	89,511,688	109,114,045	99,850,491	107,769,650	106,176,128	16.1%
2	Peru	59,575,787	68,294,460	87,777,265	79,756,394	70,313,507	10.6%
3	Ireland	41,225,878	50,104,182	50,083,049	45,205,085	54,220,235	8.2%
4	Spain	28,745,204	27,107,361	31,067,628	35,308,798	49,462,264	7.5%
5	Netherlands	42,927,115	43,647,447	38,793,234	44,509,042	47,619,078	7.2%
6	United States	64,676,622	52,565,089	41,582,419	37,746,732	40,797,303	6.2%
7	Chile	36,092,482	29,518,394	34,950,598	43,139,579	37,769,125	5.7%
8	Argentina	51,183,143	35,989,378	37,989,570	42,369,517	35,749,186	5.4%
9	Canada	26,871,237	40,006,931	42,955,872	43,778,081	31,170,251	4.7%
10	Russian Federation	12,648	0.0	393,725	13,628,055	17,888,191	2.7%

Source: GTT 2017

Although, France produces an average of 200,000 metric tonnes (MT) of shellfish annually according to Agrimer, this is not enough to satisfy France consumer appetite for shellfish products. Mussels and oysters represent 39.0% and 38.2% of the production respectively, with scallops, clams and abalones making up the rest. Canada was the fifth largest non-EU supplier.

With an annual oyster production of 76,714 MT, France is Europe's largest shellfish producer and the world's fourth after China, North Korea, Japan and the US. It is also Europe's second largest producer of farmed mussels, with 78,200 MT annual production.

Historic shellfish domestic production in France by category from 2011 to 2015 in tonnes

Species	2011	2012	2013	2014	2015
Mussels	69,098	81,660	77,958	80,853	78,212
Oysters	79,338	80,609	77,698	76,705	76,714
Scallops, pectens	32,891	26,403	30,977	23,533	24,552
Abalones, winkles, conchs	13,860	11,462	12,560	12,384	12,885
Clams, cockles, arkshells	8,815	7,424	8,404	8,258	8,230
Total shellfish	204,002	207,558	207,597	201,733	200,593

Source: FAO 2017

Historic shellfish Imported to France by category from 2012 to 2016 in tonnes

HS Code	Description	2012	2013	2014	2015	2016
Total shellfish imports		98,717	99,418	101,268	100,705	103,047
030731	Live, fresh or chilled mussels	37,266	37,033	37,830	39,433	42,894
160553	Prepared mussels	14,006	12,476	13,108	13,833	12,832
030799	Other molluscs	10,482	9,800	10,629	11,040	11,153
030729	Scallops	15,186	16,178	15,575	13,115	10,013
030711	Fresh oysters	4,367	5,348	6,242	6,330	8,082
030739	Frozen mussels	3,411	2,715	2,610	3,374	3,602
030791	Live, fresh molluscs	3,352	3,325	2,502	2,786	3,376
160558	Prepared sea snails	3,031	3,636	3,725	2,799	3,340
030760	Fresh sea snails	2,001	2,592	3,092	2,792	3,132
030721	Fresh or chilled, scallops	4,810	5,345	4,516	3,615	2,971
030771	Fresh or chilled clams, cockles and ark shells	250	316	749	878	797
030779	Smoked, dried, salted clams, cockles and ark shells	128	140	263	271	365
160552	Prepared scallops	138	326	207	258	214
160556	Prepared clams, cockles and arkshells	164	91	148	134	155
030719	Smoked, dried, salted oysters	112	90	63	43	112
160551	Prepared oysters	6	-	5	4	7
160557	prepared abalone	7	3	3		2

Source: GTT 2017

Mussel products

France is a market of over 137,000 MT for mussel products (taking into account the local production and imports), and one of the most important in Europe. Large volumes (70%) are imported as fresh products. In 2016, some 14,941 MT of fresh mussels arrived from Spain and 13,829 MT from the Netherlands. 12,883 MT of prepared mussels came mainly from Chile, Ireland and Spain.

Fresh mussels make up the bulk of sales, to retail fishmongers and super markets, as well as the catering industry, where they are a popular dish. According to Agrimer, fresh mussels sell well in supermarkets, due to their average price of 3.50 Euros/kg, which makes them an easily accessible and convivial product. Large and medium-sized supermarkets account for 70% of sales, with the remainder sold by traditional fishmongers or in open markets.

Historic mussel products imported to France from 2012 to 2016 in tonnes

Rank	Country	2012	2013	2014	2015	2016
	World	54,682	52,227	53,548	56,641	59,326
1	Spain	14,686	11,981	13,470	15,662	15,997
2	Netherlands	14,055	13,105	12,465	13,726	15,645
3	Chile	11,526	9,472	10,222	11,255	10,379
4	Italy	3,629	6,556	7,185	6,332	7,297
5	Ireland	3,576	2,175	1,581	2,450	3,100
6	Denmark	1,117	2,028	4,065	2,802	2,521
7	United Kingdom	2,238	2,914	1,271	1,390	1,577
8	Greece	2,395	2,336	1,487	1,717	1,365
9	New Zealand	545	473	680	515	728
10	Belgium	58	59	209	151	188

Source: GTT 2017

Scallop products

France imports scallops from over twenty different countries, and 13,197 MT of scallops were imported in 2016 about 65% of total consumption. The main supplier of scallops was the UK followed by Peru and Argentina. Canada was another traditional and important supplier ranked fifth.

Scallops are much appreciated by French consumers, and associated with an image of conviviality, festivity and luxury. Like oysters, scallops consumption is strongly influenced by the seasons, with considerable increase in sales during Christmas and New Year festivities.

Historic scallop products imported to France by country from 2012 to 2016 in tonnes

Country	2012	2013	2014	2015	2016
World	20,135	21,847	20,297	16,990	13,197
United Kingdom	4,131	5,113	4,019	3,535	2,998
Peru	3,789	6,080	7,179	4,662	2,471
Argentina	4,096	3,629	3,213	2,673	2,039
United States	3,357	2,634	1,527	1,169	1,325
Canada	1,037	1,507	1,452	1,301	945
Russian Federation	1		22	704	758
Japan	361	226	253	445	421
Viet-Nam	843	331	489	112	295
Belgium	235	252	264	353	284
Germany	22	22	69	214	278

Source: GTT 2017

Locally harvested scallops are marketed live with the shell still in place, thus conveying an image of freshness to the consumer. They are also sold as shelled meat, either fresh or frozen, in controlled-atmosphere packaging, or even canned.

France is one of the largest consumer market in the world for scallops. Scallops are sold as "Coquille Saint-Jacques." The French appreciate scallops or shelled meat with a well-developed orange gonad ("noix de Coquilles Saint Jacques coraillée").

Oyster products

The French consume approximately 87,000 MT of oysters per year. 8,200 MT were imported in 2016, with Ireland and the UK suppling over 90% of it. However, the market is extremely seasonal, with sales concentrated around the New Year festivities. Agrimer notes that two out of three consumers only buy oysters during this period. A large majority of oysters are mainly sold live, still in shells. The principal distribution network for oysters is currently via supermarkets, but more oyster farmers are selling directly to consumers in open markets or at production sites.

Oysters are perceived by French consumers as a luxury product; however, it is still an affordable and accessible product. It is a celebratory meal that evokes images of sharing and health, and is a symbol of the ocean and nature. Because of this, any factors that affect this image can influence consumers.

Historic Oyster products imported to France from 2012 to 2016 in tonnes

Country	2012	2013	2014	2015	2016
World	4,486	5,438	6,308	6,376	8,202
Ireland	3,184	4,216	4,508	4,139	6,221
United Kingdom	663	829	1,441	1,650	1,415
Netherlands	179	120	178	398	353
Spain	133	90	34	38	43
Portugal	233	145	45	48	41
Germany			0	0	40
Korea (Rep. of)	10	29	45	37	37
Italy	11	5	33	13	18
Denmark	14	2	7	16	14
Iran (Islamic Rep. of)	15	0	0	0	8

Source: GTT 2017

Distribution channels

The retail channel accounted for over 83.4% of fresh fish and seafood sales in France, followed by the foodservice channel with 13.6%. The share of the retail channel increased between 2012 and 2016, while that of the foodservice and institutional channels saw a slight decline over that same period.

Distribution of fresh fish and seafood sales in France – percentage (%) breakdown based on volume sales

% total volume	2012	2013	2014	2015	2016
Retail	81.6	82.7	82.2	82.3	83.4
Foodservice	14.8	14.6	14.5	14.4	13.6
Institutional	3.6	2.7	3.3	3.4	3.0
Total	100.0	100.0	100.0	100.0	100.0

Source: *Euromonitor 2017*

FOR MORE INFORMATION

All EU fish and seafood tariffs are eliminated under CETA. For Canadian producers, this will mean duty-free access on 96% of EU tariff lines immediately upon CETA's implementation. The EU will then phase out tariffs on the remaining 4% of its fish and seafood tariff lines over the next 3 to 7 years. Shellfish products are among the products that will benefit from EU tariff elimination.

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

Overview of Trade Commissioner Services in France

http://www.tradecommissioner.gc.ca/e-f/fr/index.htm

Find a Trade Commissioner

www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

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For additional Information on Seafood Expo Global 2017, please contact:

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Sector Trend Analysis: **Shellfish ProductsTrend in France**

Global Analysis Report
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